

EMPLOYEE:

CLAIM #



Job Analysis Form

ALTERNATE FORMAT AVAILABLE

JOB TITLE Fiscal Specialist II

JOB CLASSIFICATION Fiscal Specialist II

DOT TITLE Fiscal Clerk

DOT NUMBER 216.382-022

DEPARTMENT Community and Human Services

DIVISION Developmental Disabilities

OF POSITIONS IN THE DEPARTMENT WITH THIS JOB TITLE 2

CONTACT'S NAME & TITLE Esther Wu, Business and Finance Officer IV

CONTACT'S PHONE 206-263-9054

ADDRESS OF WORKSITE

401 Fifth Avenue, Suite 520
Seattle, WA 98104-1818

VRC NAME Kyle Pletz

DATE COMPLETED 1/5/04

VRC NAME Jeff Casem

DATE REVISED 05/08/08

WORK HOURS

8:00am-5:00pm Monday through Friday, 40 hours per week, with two fifteen minute breaks and a one-hour lunch.

OVERTIME (Note: Overtime requirements may change at the employer's discretion)
Optional on a Rare occasion; during the end of the financial year.

JOB DESCRIPTION

Provides technical, financial, accounting and/or fiscal support services. Duties also include basic coding of financial, accounting and/or fiscal information, calculating accounts payable and accounts receivable and cashiering.

ESSENTIAL ABILITIES FOR ALL KING COUNTY JOB CLASSIFICATIONS

1. Ability to demonstrate predictable, reliable, and timely attendance.
2. Ability to follow written and verbal directions and to complete assigned tasks on schedule.
3. Ability to read, write & communicate in English and understand basic math.
4. Ability to learn from directions, observations, and mistakes, and apply procedures using good judgment.
5. Ability to work independently or part of a team; ability to interact appropriately with others.
6. Ability to work with supervision, receiving instructions/feedback, coaching/counseling and/or action/discipline.

JOB SPECIFIC REQUIREMENTS

Two years previous experience in accounts payable and receivable; PC computer experience with Microsoft Windows and local area networks; intermediate-level proficiency in Microsoft Excel and Access; experience with sorting and duplexing on copy machines; the ability to participate as a team member, set priorities and respond to a variety of work requests; past experience with governmental organizations is desirable.

ESSENTIAL FUNCTIONS

1. Process invoices for payment in accordance with contract compensation method and amount, and prepares payment documents for approximately 55 contract agencies.
2. Process confidential client billing information from contract agencies into an Access data system. Some data requires manual entry, but the majority of data is received as Excel files and transferred into the Access system.
3. Prepare and reconcile general and subsidiary ledger cards and other reports in Excel spreadsheet format, based on invoice documents.
4. Provide backup support in general office duties including telephone coverage and word processing. This position also backs up the Division Confidential Secretary during short-term absences by taking DD Board minutes.
5. This position supports several other positions in preparing mailings such as announcements, agendas and contracts, by using an Access database and Word merge features to generate mailing labels, letters and other documents. Also, may perform other general office tasks as necessary to assist staff.
6. Provide specialized and/or technical information that requires moderate interpretation of established policies, procedures and guidelines to internal and/or external customers. Some incumbents may have to deal with sensitive and/or potentially volatile situations.
7. Compile data that may require information searches through files, contracts, records, microfilm, or computer files, including spreadsheets and/or customized database applications.
8. Perform basic numerical calculations involving accounts payable, accounts receivable, cashiering, reconciliation of accounts, monitoring of routine expenditures, payroll and/or other applications.
9. Perform basic coding of financial, accounting and/or fiscal information.
10. Establish, maintain, modify, retrieve and track financial, accounting and/or fiscal information using a variety of methods.
11. Enter, obtain and/or verify financial, accounting and/or fiscal information following established clearly defined methods and guidelines.
12. Provide technical assistance to customers with regard to appropriate and applicable codes, policies, regulations, contracts and laws.
13. Maintain, inventory, order, collect and distribute supplies and/or equipment.
14. Compose, draft, type and/or word process, proofread and edit documents, contracts and/or correspondence when needed.
15. Process mailings and documents that may require attaching related correspondence or information; select mail to handle personally where the response requires specialized knowledge of the assigned function; identify priority and/or time-sensitive matters; and maintain security and confidentiality.
16. Conduct orientation and/or train co-workers.

17. Modify and update assigned work procedures.
18. Back up receptionist, answer telephones during breaks.

NON-ESSENTIAL FUNCTIONS

1. Participate on various committees.
2. Lift/carry paper for the copy machine.

PERSONAL PROTECTIVE EQUIPMENT USED

None identified.

OTHER TOOLS & EQUIPMENT USED

Computer, keyboard, 10-key, mouse, luggage cart, printer, multi line telephone, copy machine, calculator, typewriter, rubber stamps, stapler, pen/pencil, envelopes, various documents, mail, check money order and various office supplies.

PHYSICAL DEMANDS AS JOB IS TYPICALLY PERFORMED

Continuously = occurs 66-100% of the time

Frequently = occurs 33-66% of the time

Occasionally = occurs 1-33% of the time

Rarely = may occur less than 1% of the time

Never = does not ever occur (such demands are not listed)

Highly Repetitive = Repeating the same motion every few seconds with little or no variation for more than two hours total per day.

This job is classified as

Sedentary—exerting up to ten pounds of force occasionally and/or a negligible amount of force frequently. A sedentary job involves sitting most of the time.

Standing

Health Care Provider initials if restricted _____

Occasionally on tile, carpet or vinyl surfaces for up to 5 minutes at a time for up to 10 minutes total in a work shift. Most commonly occurs while speaking with co-workers and operating the copy machine. The employee may stand up to one hour in a shift on a rare occasion during busy period of the financial year. The employee can alternate sitting with standing by alternating duties.

Walking

Health Care Provider initials if restricted _____

Occasionally on tile, carpet or vinyl surfaces for distances of up to 200 feet for up to 5 minutes at a time for up to 15 minutes total in a work shift. Most commonly occurs while walking within the office to make copies as well as deliver files and documents. On a rare occasion (up to once a month) the employee may need to walk to and from a bus stop to attend a meeting in another building.

Sitting

Health Care Provider initials if restricted _____

Continuously on a desk chair for up to 30 minutes at a time for up to 5.5 hours total in a work shift. Most commonly occurs while talking on the telephone and performing computer duties as well as reviewing documents and contracts.

Bending neck down

Health Care Provider initials if restricted_____

Occasionally for up to 10-15 minutes at a time for up to 2 hours total in a work shift. Most commonly occurs while reviewing documents, invoices and contracts. During the busy financial season the employee may bend the neck down for up to 3 hours in a work shift.

Bending/Stooping

Health Care Provider initials if restricted_____

Occasionally on carpeted surfaces for up to 1 minute at a time for up to 15 minutes in a work shift. Most commonly occurs while retrieving files from low shelves, drawer and cabinets as well as loading paper in to the copy machine, removing jams from the copy machine, filing and reaching for various office supplies. Bending/stooping may be reduced by alternating with crouching or kneeling.

Kneeling

Health Care Provider initials if restricted_____

Occasionally on carpeted surfaces for up to 1 minute at a time for up to 15 minutes in a work shift. Most commonly occurs while retrieving files from low shelves, drawer and cabinets as well as loading paper in to the copy machine, removing jams from the copy machine, filing and reaching for various office supplies. Kneeling can be reduced by alternating with bending/stooping or crouching.

Squatting

Health Care Provider initials if restricted_____

Occasionally on carpeted surfaces for up to 1 minute at a time for up to 15 minutes in a work shift. Most commonly occurs while retrieving files from low shelves, drawer and cabinets as well as loading paper in to the copy machine, removing jams from the copy machine, filing and reaching for various office supplies. Crouching can be reduced by alternating with bending/stooping or kneeling.

Reaching above shoulder height

Health Care Provider initials if restricted_____

Rare for up to 5 seconds at a time for up to 1 minute total in a work shift while retrieving files from upper shelves and cabinets as well as when utilizing overhead bins.

Reaching at waist to shoulder height

Health Care Provider initials if restricted_____

Frequently for up to 30 minutes at a time for up to 5.5 hours total in a work shift while manipulating documents, handling payments, manipulating supplies and performing computer work.

Reaching at knee to waist height

Health Care Provider initials if restricted_____

Occasionally for up to 1 minute at a time for up to 5 minutes total in a work shift while retrieving files, adding paper to the copy machine, removing copy machine jams and manipulating various office supplies in desk drawers.

Reaching at floor to knee height

Health Care Provider initials if restricted_____

Occasionally on carpeted surfaces for up to 1 minute at a time for up to 15 minutes in a work shift. Most commonly occurs while retrieving files from low shelves, drawer and cabinets as well as loading paper in to the copy machine, removing jams from the copy machine, filing and reaching for various office supplies.

Lifting 1-10 pounds

Health Care Provider initials if restricted_____

Rarely for up to 10 seconds at a time for up to 5 minutes total in a work shift. Most commonly occurs with weights of 1-5 pounds while adding paper to the copy machine as well as manipulating files, contracts and documents.

Carrying 1-10- pounds

Health Care Provider initials if restricted_____

Rarely for distances of up to 40 feet for up to 30 seconds at a time for up to 5 minutes total in a work shift. Most commonly occurs with weights of 1-5 pounds while transporting a ream of paper to the copy machine or transporting files, contracts and documents.

Pushing and Pulling

Health Care Provider initials if restricted_____

Rarely with a force of up to 5 pounds for up to 5 seconds at a time and up to 5 minutes total in a work shift while retrieving/replacing files in file cabinets and on shelves, opening and closing drawers and adding paper to the copy machine and the printer. On a rare occasion the employee may use a luggage cart to transport files and documents to a meeting at another building.

Handling

Health Care Provider initials if restricted_____

Occasionally for up to 10 minutes at a time for up to 1 hour total in a work shift. Most commonly occurs while manipulating files, mailing out contracts, provider reports, telephone receiver, documents and contracts.

Operating Controls with Hands

Health Care Provider initials if restricted_____

Occasionally for up to 1 minute at a time for up to 3 hours total in a work shift while operating a computer mouse.

Fingering

Health Care Provider initials if restricted_____

Frequently for up to 30 minutes at a time for up to 4 hours total in a work shift while performing computer duties, using keyboard and 10-key and writing as well as manipulating documents, files and contracts.

Talking

Health Care Provider initials if restricted_____

Occasionally with co-workers and customers for up to 5 minutes a time for up to 30 minutes total in a work shift while conversing with co-workers and agencies, answering telephones and as well as reconciling accounts.

Hearing

Health Care Provider initials if restricted_____

Occasionally with co-workers and customers for up to 5 minutes a time for up to 30 minutes total in a work shift while conversing with co-workers and agencies, answering telephones and as well as reconciling accounts.

Seeing

Health Care Provider initials if restricted_____

Continuously to read for up to 30 minutes at a time for up to 6.5 hours total in a work shift while reading spread sheets on a computer screen as well as reviewing hardcopies of written materials, contracts and documents.

ENVIRONMENTAL FACTORS

Work is performed in an office setting in close proximity to other workers and cubicles. The noise level is quiet. Copy machine and telephone ringers are the loudest noises in the office.

The noise level is

HCP Initials if Restricted

Approximately 40-50 decibels. The noise is caused by general office sounds.

POTENTIAL MODIFICATIONS TO JOB

Utilize a cart to reduce carrying.

Alternate bending/stooping, kneeling and crouching as needed.

Ergonomic workstation to promote proper posture while performing computer duties.

Flat screen monitor to create more desk space and allow for appropriate monitor depth.

Telephone headset to promote proper posture while talking on the telephone and typing on the computer at the same time.

Sit stand workstation to allow more opportunity to alternate sitting and standing.

SIGNATURES

Signatures on this page are obtained before the document becomes available for use and are not required each time the document is reused. Obtained signatures are kept on file at King County Safety & Claims. The Health Care Provider signature section is separate and appears on the following page.

Kyle Pletz, VRC, Vocational Consultant

Printed name & title of VRC evaluator

Signature of VRC evaluator

Date

Printed name & title of contact

Signature of contact

Date

Printed name & title of contact

Signature of contact

Date

HEALTH CARE PROVIDER SECTION

Check all that apply

- ☐ The employee is released to perform the described duties without restrictions on performance or work hours as of _____.
- ☐ The employee is released to perform the described duties on a reduced schedule as of _____. The recommended schedule is: _____
☐ Temporary until _____ ☐ Permanent as of _____
- ☐ The employee is released to perform the described job with the following modifications: _____

☐ Temporary until _____ ☐ Permanent as of _____
- ☐ The employee is not released to perform the described duties due to the following job functions: _____

☐ Temporary until _____ ☐ Permanent effective _____
- ☐ The employee is unable to work in any capacity.
A release to work is: ☐ anticipated by _____ ☐ Not expected

The limitations are due to the following objective medical findings:

Printed or typed name and phone number of Health Care Provider

Signature of Health Care Provider

Date